sugarcrm

# The Sales Pulse: Managing Through Activities

## Sugar Sell Foundations Webinar Series

Andrea Ayers, Sr. Product Trainer & Instructional Designer

January 2026

1

## Today's Agenda

- Why activity tracking matters
- Calls, Meetings, Notes, Tasks, Emails, and Messages in Sugar
- Activity tracking best practices
- Using Sugar Connect
- One-click activity tracking
- Dashboards, reports & coaching
- Q&A



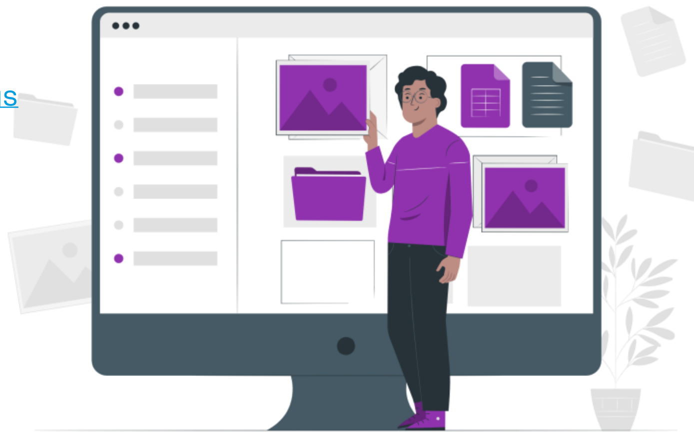
sugarcrm

2

## Resources

- [Sugar Application Guide > Calls]
- [Sugar Application Guide > Meetings]
- [Sugar Application Guide > Notes]
- [Sugar Application Guide > Tasks]
- [Sugar Connect User Guide]
- [SugarLive Message Records]

- [SugarLive User Guide]
- [Calendar]
- [Creating Action Buttons]
- [Last Interaction Field]





sugarcrm

3

# Why Activity Tracking Matters



sugarcrm

4

## Why Activities Matters

**Activities = Engagement. Movement. Momentum.**

- Show customer interaction history
- Enable meaningful coaching
- Improve forecasting accuracy
- Prevent follow-up gaps
- Drive deal progression

5

## What Happens Without Activity Tracking

No visibility into rep effort

Missed follow-ups

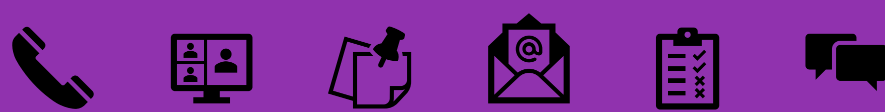
Inaccurate pipeline assumptions

Coaching becomes guesswork

Deals slow or stall

6

# Calls, Meetings, Notes, Tasks, Emails, and Messages in Sugar





sugarcrm

7

## Sugar Activity Types



sugarcrm

8

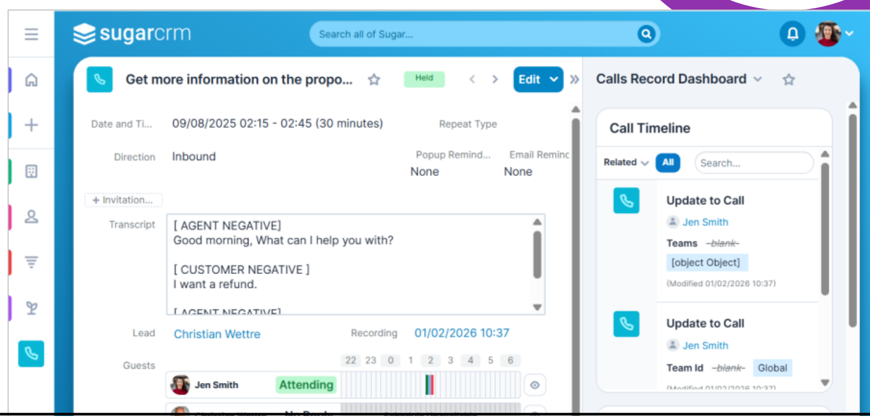
# Calls: When & Why

Use **Calls** for:

- Phone conversations
- Call attempts or voicemails
- Scheduled or completed calls

**Key fields:**

- Direction
- Status
- Internal Notes
- Guest






9

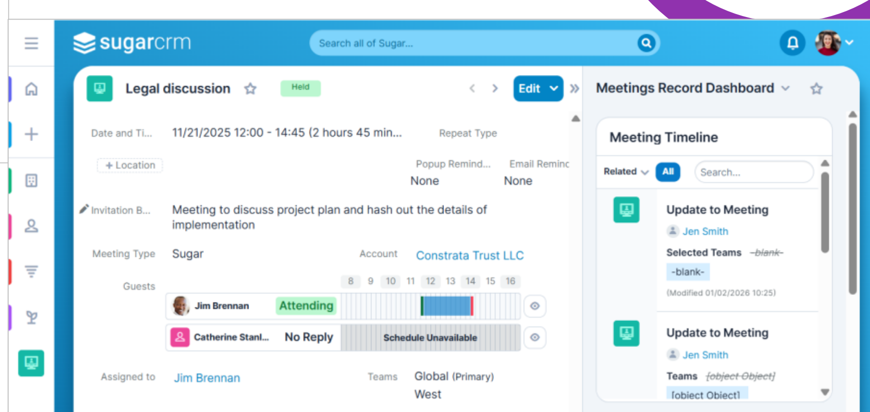
# Meetings: When & Why

Use **Meetings** for:

- Scheduled demos
- Discovery sessions
- Zoom/Teams calls
- Any interaction requiring a date/time

**Key fields:**

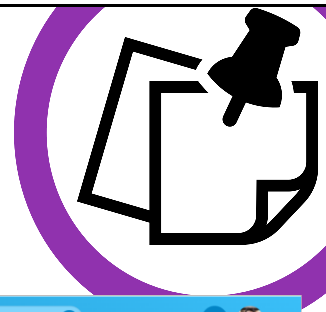
- Repeat Type
- Location
- Internal Notes
- Guest






10

# Notes: When & Why

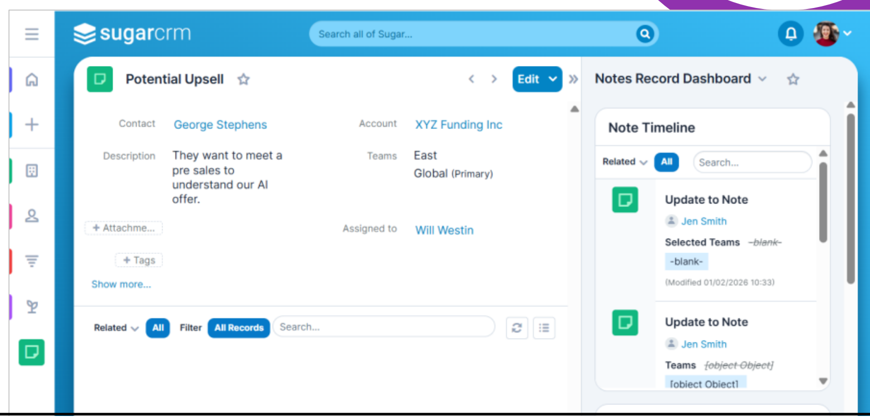


Use **Notes** for:

- Information that doesn't have a due date
- Important info about the related record (like a contact) that's not a call or meeting

**Key fields:**

- Description
- Attachment






11

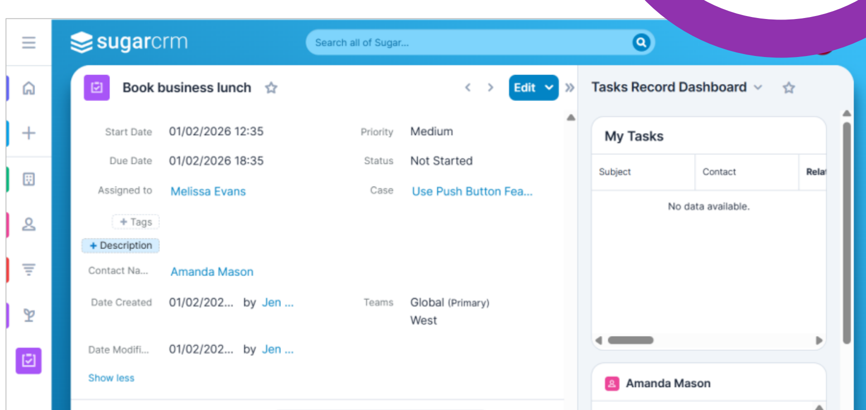
# Task: When & Why

Use **Tasks** for:

- Follow-ups
- To-dos that aren't meetings/calls
- Internal reminders or to-do's

**Key fields:**

- Start and End Dates
- Status
- Priority
- Description






12

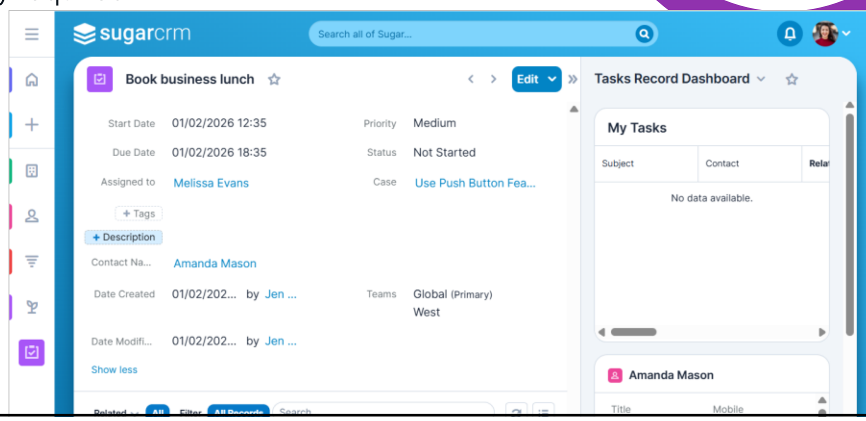
# Email Tracking (via Sugar Connect)

Use **Sugar Connect Email Tracking** for:

- Automatically capture inbound/outbound emails
- Link emails to Leads, Contacts, Accounts, Opportunities
- No manual data entry required

**Other Options:**

- Sugar Email Client
- External Email
- Clients
- Composing and Sending Outbound Emails
- Email Campaigns
- Email Templates
- Integration with DocuSign






13

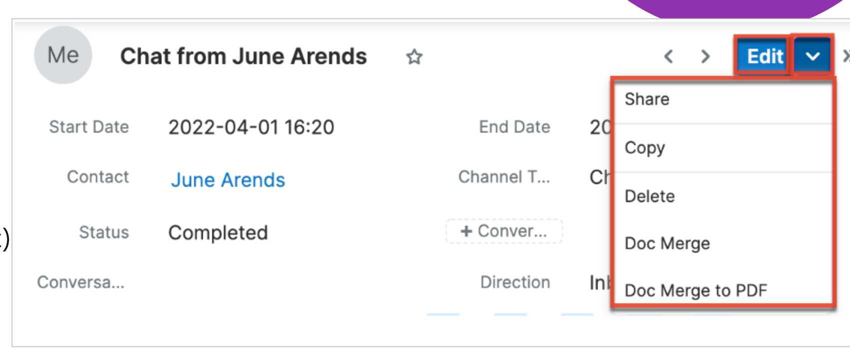
# Messages: When & Why

Use **Messages** for:

- For customers using SugarLive
- Represent historical records of instant messaging chat
- New message record containing the chat transcript.

**Key fields:**

- Related to (flex-rate field type – module and record that is related to this message)
- Guests (participants in the conversation)
- Conversation (transcript)






sugarcrm

14

# Using Tracking Best Practices



sugarcrm

15

## Decision Guide: What Should I Log?

| Interaction | Type of Record |
|---|---|
| **Phone interaction?** | Log or schedule a Call |
| **Gathering Group of People Discussion (Virtual or In-Person)** | Create a Meeting |
| **Attach a file or additional information to a record in Sugar** | Create a Note |
| **Follow-up needed?** | Create a Task |
| **Email sent/received?** | Logged via Connect |
| **Use SugarLive Chat to communicate with clients?** | A Message Record is automatically created |



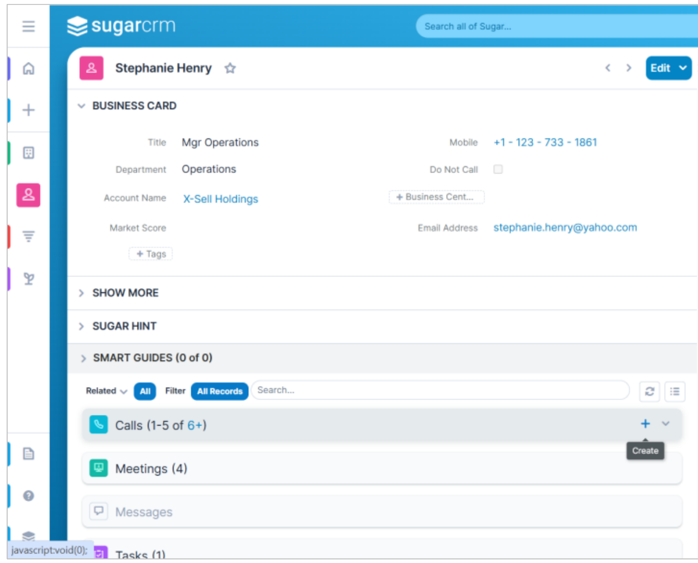
sugarcrm

16

# Making Activity Logging Easy

**Tools that streamline tracking:**

- **Subpanels**



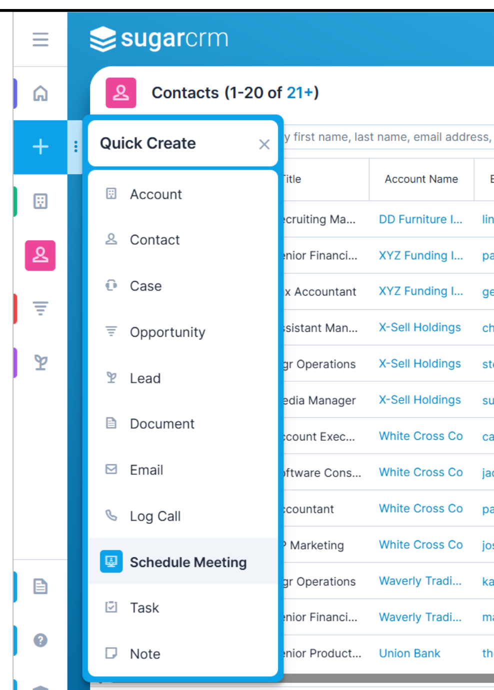



17

# Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- **Quick Create**



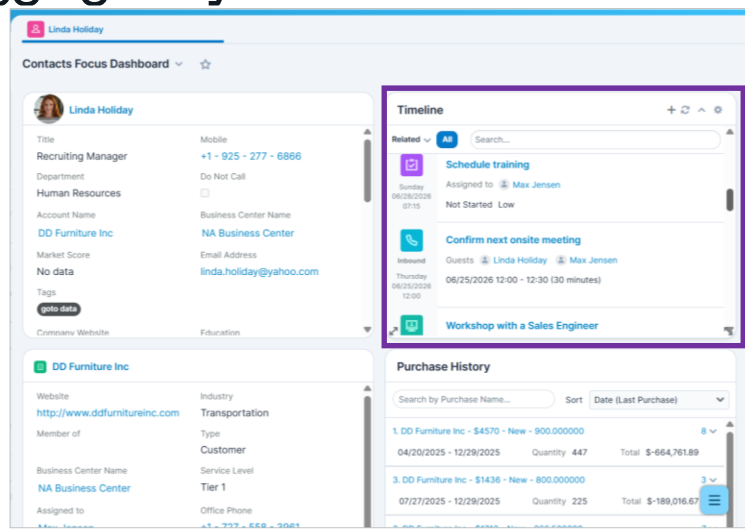



18

# Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- Quick Create
- **Timeline** view



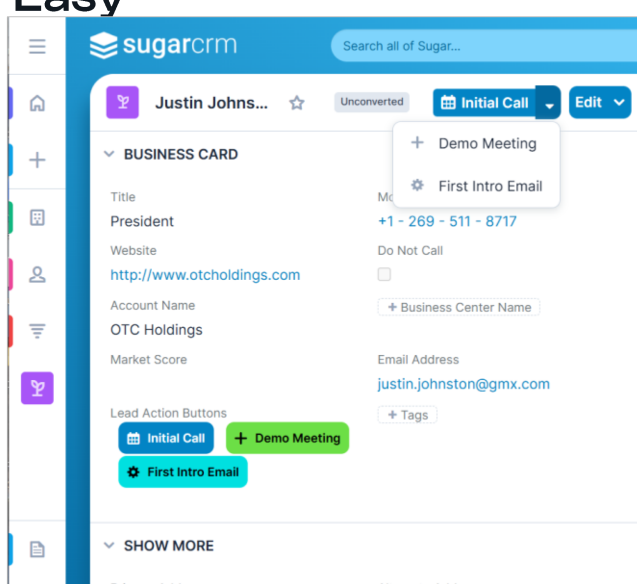



19

# Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- Quick Create
- Timeline view
- **Action Buttons**

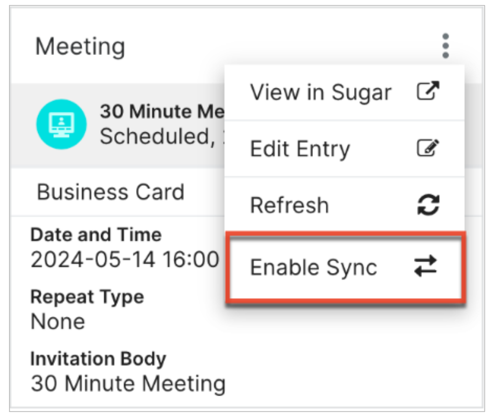





20

# Making Activity Logging Easy

**Tools that streamline tracking:**
- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- **Sugar Connect** syncing



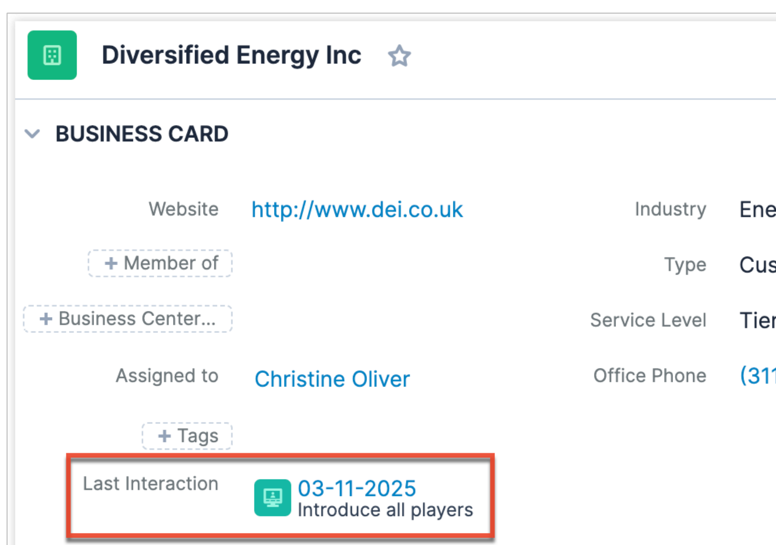



sugarcrm

21

# Making Activity Logging Easy

**Tools that streamline tracking:**
- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- Sugar Connect syncing
- **Last Interaction** field on account records



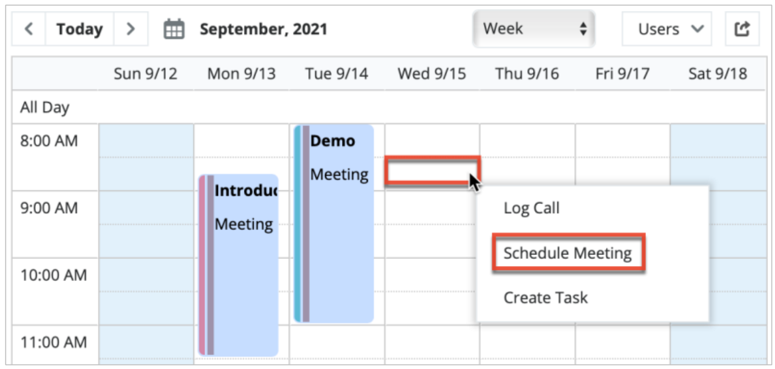



22

# Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- Sugar Connect syncing
- Last Interaction field on account records
- **Calendar**






23

# Suggested Calendar Admin Quick Setup

- Create a role [Admin>Role Management]
  - Set the **Calendar** Module permissions to :
    - Access: Enabled
    - Access Type: Normal
    - Edit & Delete: Owner
    - List & Record View: All

| Access | Access Type | Delete | Edit | Export | Import | List | Mass Update | Record View |
|---|---|---|---|---|---|---|---|---|
| Enabled | Normal | Not Set | Owner | Owner | Not Set | All | Not Set | All |

  - Add all calendar users to this role in Users panel

**Results**: Users can view team calendars but **only** edit or delete their own calendar

24

# One-click Activity Tracking



sugarcrm

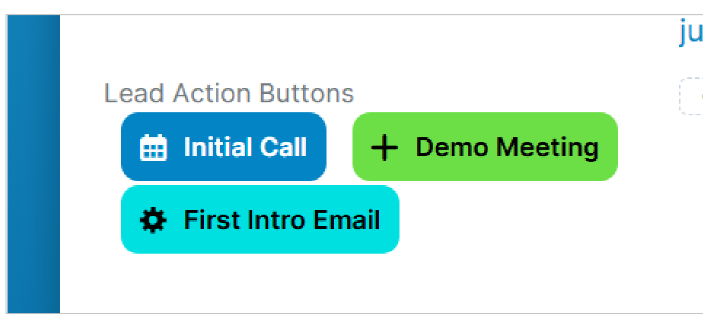
25

## Action Buttons for 1-click Logging

Examples:

- “Log a Call”
- “Schedule Follow-Up”
- Auto-populated activity records

**Benefits:** Fast · Consistent · Accurate






sugarcrm

26

## Working in Sugar: Best Practices

- Log activities in context using subpanels
- Use Quick Create for speed
- Review Timeline before reaching out
- Keep outcomes & purpose fields updated



sugarcrm

27

## Sugar Connect: Calendar & Email Sync

- Sync meetings from Outlook/Gmail
- Log emails to Sugar directly from inbox
- Add new Contacts/Leads from email
- Auto-capture meeting invites & reminders



sugarcrm

28

## Daily "Workflow" Example

1. Receive email from prospect → auto-logged
2. Schedule discovery call → synced Meeting
3. Hold call → log Call outcome
4. Create Task for follow-up
5. Manager reviews activity history in dashboard



sugarcrm

29

## Dashboards, Reports, & Coaching

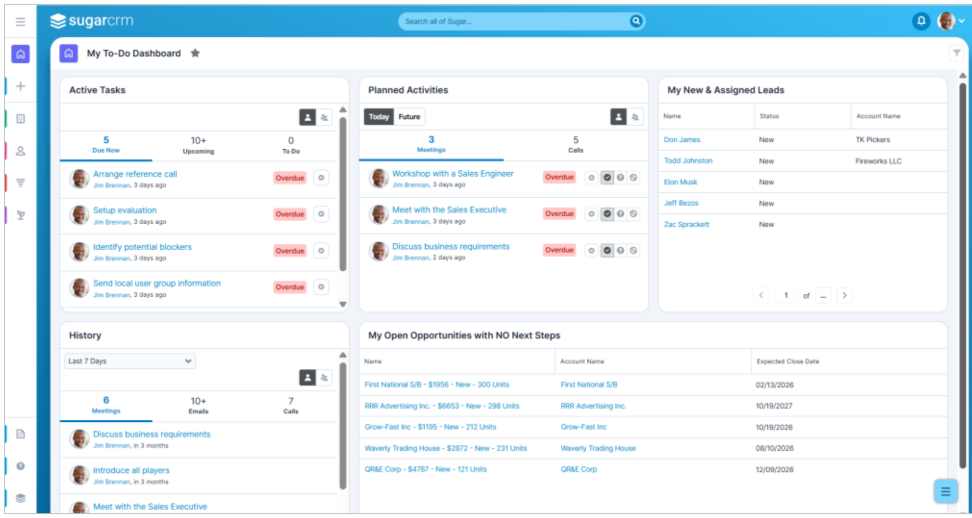


sugarcrm

30

# Dashlets on Dashboards for Reps

- My Activities
- Upcoming Meetings/Calls
- Recent Communications
- Opportunity with no Next Steps






sugarcrm

31

# Dashboards for Managers: What to Look for

🔍 **Activity Gaps**
Opportunities with little or no recent engagement

⏳ **Aging Activities**
Long gaps between customer interactions

🔁 **Follow-Up Discipline**
Clear next steps after calls and meetings

⚖️ **Activity Balance**
Healthy mix of Calls, Meetings, Emails and Tasks

📈 **Activity → Pipeline Movement**
Engagement that drives stage progression

**Key mindset:** Look for patterns—not just volume



sugarcrm

32

## Reports for Operational Insight

- Calls by Outcome (Connected – Productive, Connected – Not Interested, Left Voicemail, No Answer, Follow-Up Scheduled, Demo Booked, Disqualified)
- Meetings by Type (Live, Sugar, Teams, Zoom)
- Weekly Activity Summary by Rep
- Activity → Pipeline movement

  In Sugar, this is often built by:
  - Linking **Activities → Opportunities**
  - Tracking **stage change date**
  - Using **Activity Outcome** as a grouping dimension
  - Optionally layering **SugarBPM** triggers for "stage advanced within X days of activity"



sugarcrm

33

## Embedding Activities Into Coaching

- Review patterns in weekly 1:1s
- Discuss quality of conversations
- Assess follow-up discipline
- Identify skill gaps



sugarcrm

34

# Key Takeaways and Q&A



sugarcrm

35

## Key Takeaways

- Activities drive **visibility** & **accountability**
- Calls, Meetings, Notes, Tasks, Emails, and Messages each serve distinct **roles**
- Sugar Connect **eliminates manual steps**
- Action Buttons make **tracking effortless**
- Dashboards & reports **operationalize the process**



sugarcrm

36

# Questions?



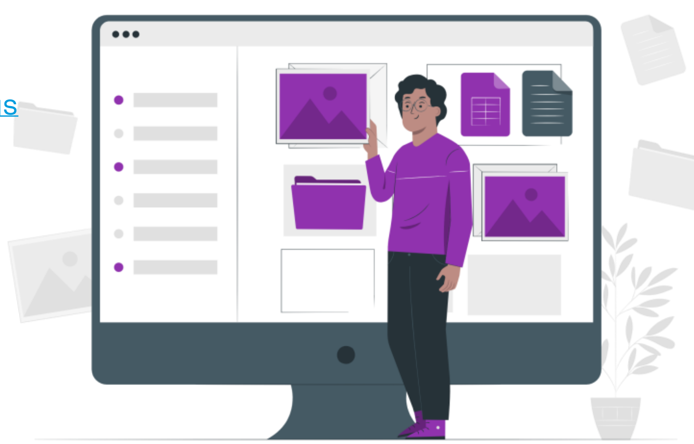
sugarcrm

37

# Resources

Sugar Application Guide > Calls
Sugar Application Guide > Meetings
Sugar Application Guide > Notes
Sugar Application Guide > Tasks
Sugar Connect User Guide
SugarLive Message Records

SugarLive User Guide
Calendar
Creating Action Buttons
Last Interaction Field





sugarcrm

38

## Next in Series

[Jan 13: Sugar on the Go: Mobile Selling Made Easy]

[Jan 20: Less Busywork, More Selling – Automating Your Sugar Workflows]

[Jan 27: Sales Mastery: Driving Growth with Sugar]



sugarcrm

39

sugarU | **Unlock sales potential**

Thanks for attending.



40